BAKORITECH


**PRODUCT CASE STUDY**

# Sales & Property Management System

**OPERATIONS • SALES TRACKING • REPORTING**

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Role: Full-Stack Developer

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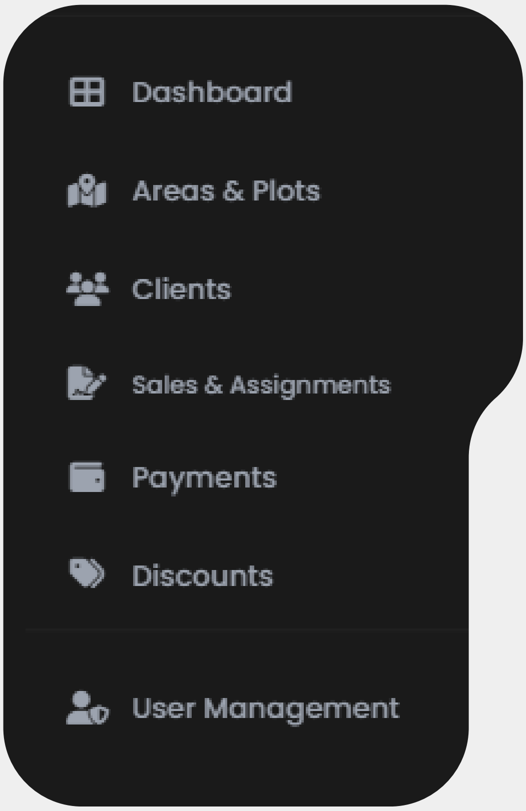
bakoritech • Full-Stack Web Development • Admin Dashboards • SaaS Systems




# Table of Contents

A workflow driven system for managing properties, clients, contracts, payments, and reports.

# Executive Summary

A workflow-driven platform for managing property inventory, clients, sales contracts, payments, and reporting.

## Mission

To help property and real estate businesses replace manual tracking with a structured system that improves visibility, accountability, and daily decision-making.

## Vision

To provide a reliable, easy-to-use management platform that supports growth, improves customer experience, and ensures accurate records across operations.

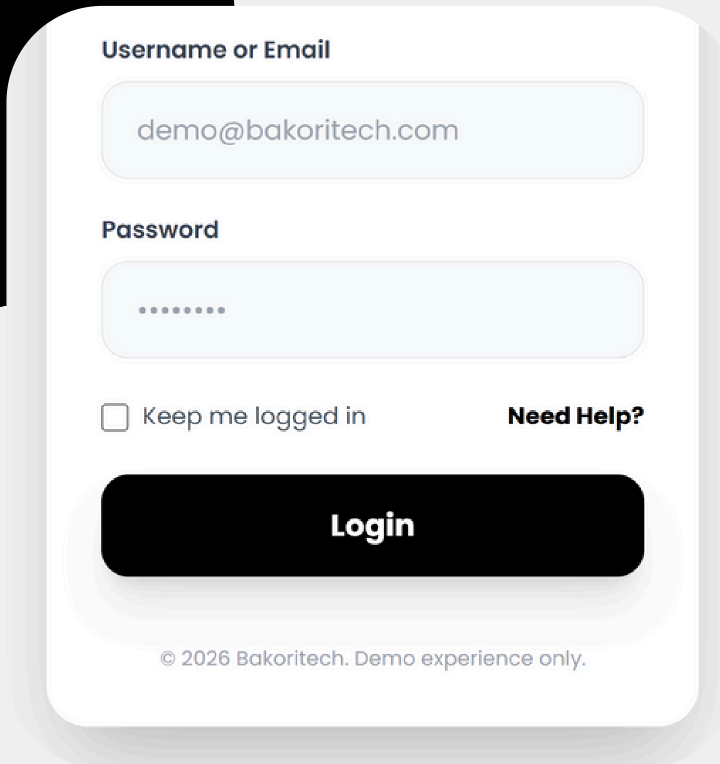
Project Snapshot

Type: Business Management Web App
Core Focus: Inventory • Sales • Payments • Reporting
Users: Admin, Staff, Management, Clients
Key Outcome: Clear tracking of plots, contracts, outstanding balances, and receipts.

| | |
|---|---|
| The Product | A Sales & Property Management System that tracks areas, plots, client records, contracts, installment plans, payments, and outstanding balances with dashboards and exportable reports. |
| The Solution | Many property businesses rely on spreadsheets and paper records, making it difficult to track inventory status, client payments, receipts, and revenue performance across time. |
| Key Modules | Dashboard, Area & Plot Management, Client Management, Sales/Contracts, Payments & Receipts, Discounts, User Management, Reporting & Exports. |
| Reporting & Visibility | Real-time metrics for revenue, active plots, total clients, outstanding balances, and transaction history — with PDF/Excel exports for management reporting. |
| Automations | Automated notifications to management when new clients or payments are recorded, plus welcome emails and payment tracking support for clients. |

# Login & Access

**Secure authentication and controlled access for staff and administrators.**




AUTH

## Secure Login

Users sign in with verified credentials to access the system. Built to keep sensitive business and client records protected.

ROLES

## Role-Based Access

Access can be controlled based on user roles (Admin/Staff). This ensures each user only sees what they're permitted to manage.

SESSION

## Protected Sessions

Login sessions are managed securely to prevent unauthorized access. Users remain signed in while working and can log out anytime.

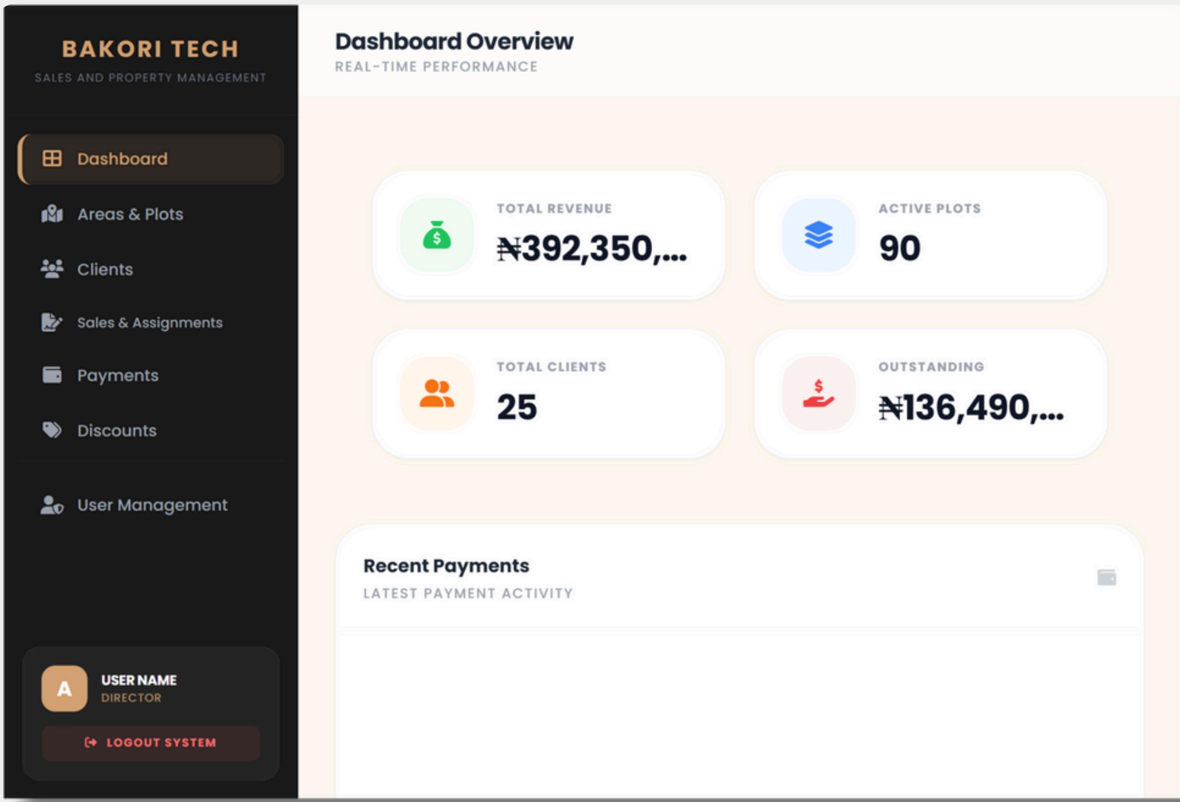
USERS

## Account Management

Admins can create new user accounts, reset passwords, and deactivate access when needed for security and staff changes.

# Dashboard Overview

**A quick view of revenue, plots, clients, outstanding balances, and recent activity.**




Designed for daily Operations: fast insights, quick actions and clear reporting

## Key Dashboard Metrics

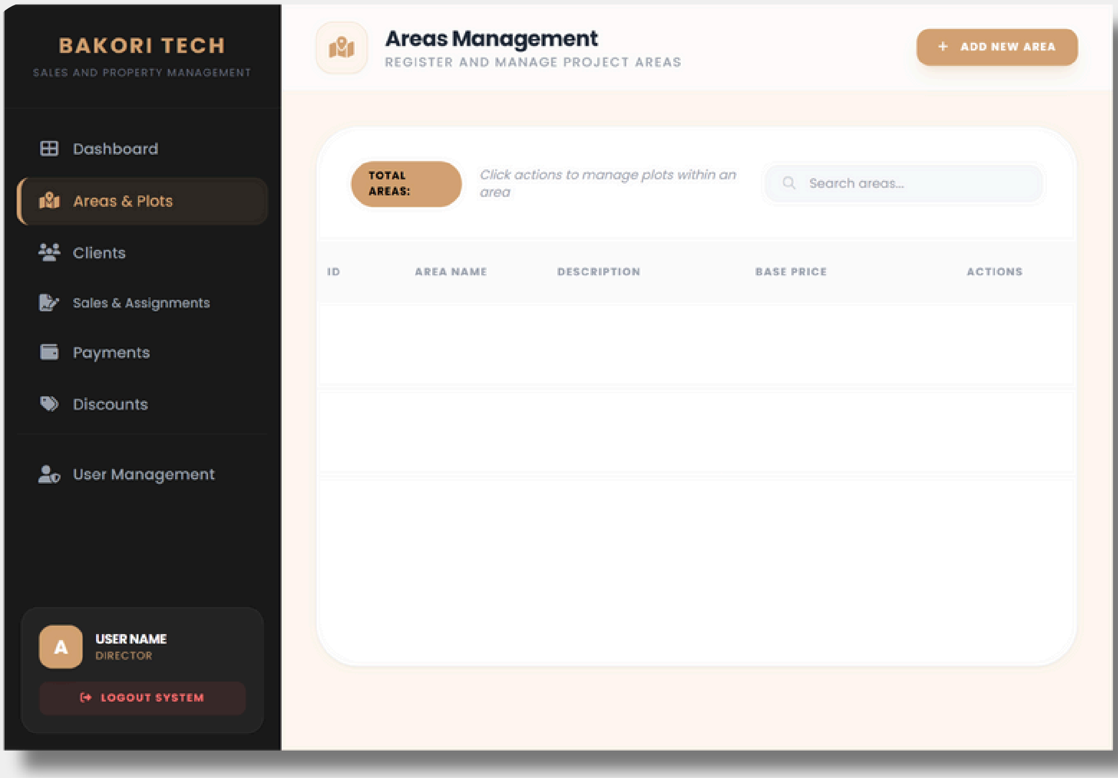
- **Total Revenue:** Real-time sales performance tracking
- **Active Plots:** Total Plots (Including available and sold)
- **Total Clients:** Customer base overview
- **Outstanding Balance:** pending payments and obligations
- **Recent Payments & Purchases:** quick activity monitoring

# Area & Plot Management

**Organize properties by area, track plot availability, and manage assignments in one place.**



## Areas Management Overview




Area Management Snapshot

## Key Area Metrics

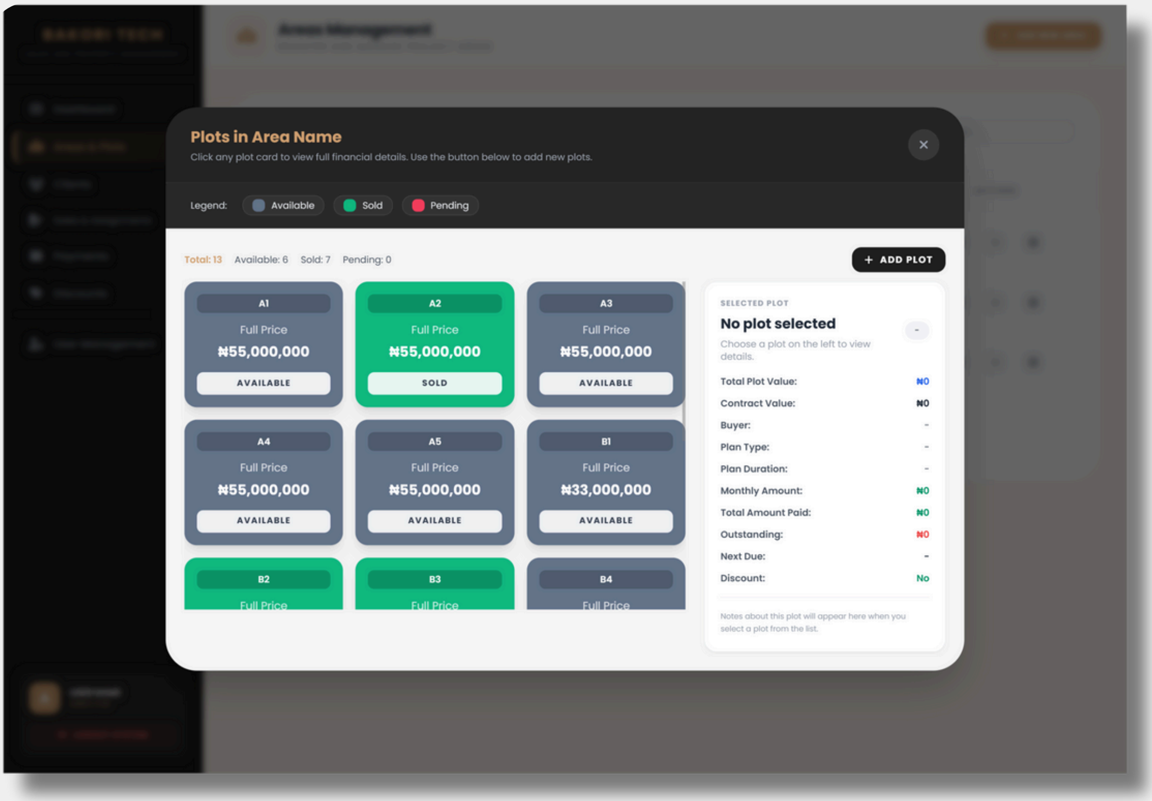
- **Area Management:** Add and manage new areas for better organization
- **Search & Filtering:** Quickly find areas and plots by name/status
- **Plot Details:** View total plots, available, sold, and pending

# Area & Plot Management

**Organize properties by area, track plot availability, and manage assignments in one place.**



## Plot Detail Overview



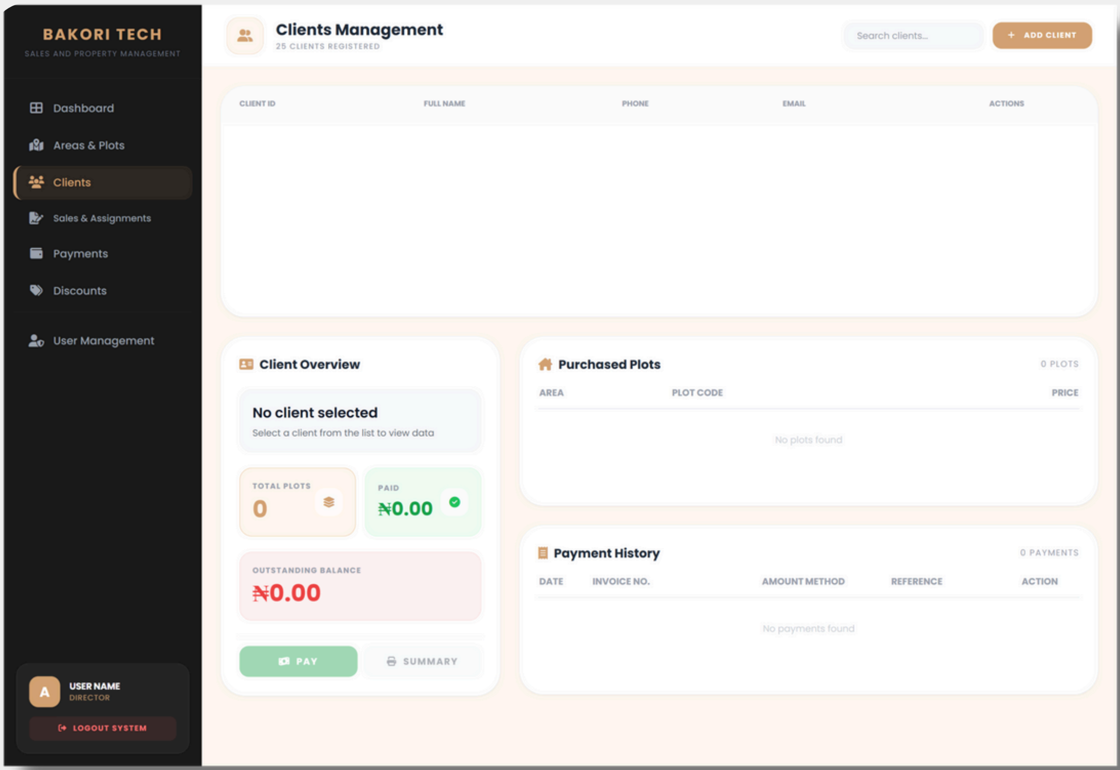

Plot Detail Snapshot

## Plot Detail Snapshot shows:

- Total plot value & contract value
- Buyer assignment
- Payment plan type & duration
- Total paid, outstanding, and nect due date
- Discount status

# Client Management

**Manage client records, assign plots, track payment history, and generate receipts with confidence.**




Designed for clean records: quick onboarding, reliable tracking, and complete client history in one place.

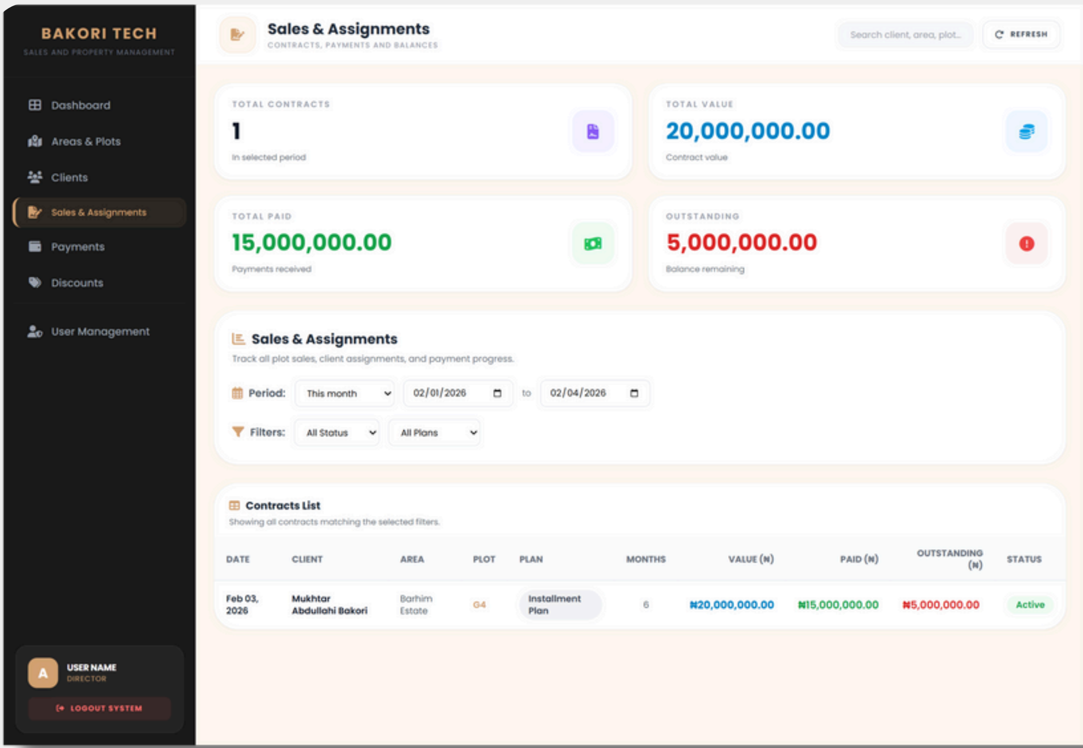
## Key Client Features:

- **Client Directory**: View all clients with searchable records and details
- **Client Onboarding:** Add new clients with biodata and next-of-kin information
- **Plot Assignment:** Assign clients to specific areas and  plots during registration
- **Payment History:** View complete payment timeline and outstanding balamce
- **Receipts & Proof**: Generate and view transaction receipts anytime
- **Record Payments:** Quickly add payments with method, reference, and proof upload

# Sales / Contracts



**Track contracts by period, monitor revenue performance, and manage outstanding balances in real time.**




Built for clarity: filtered contract reporting with accurate status tracking and performance visibility.

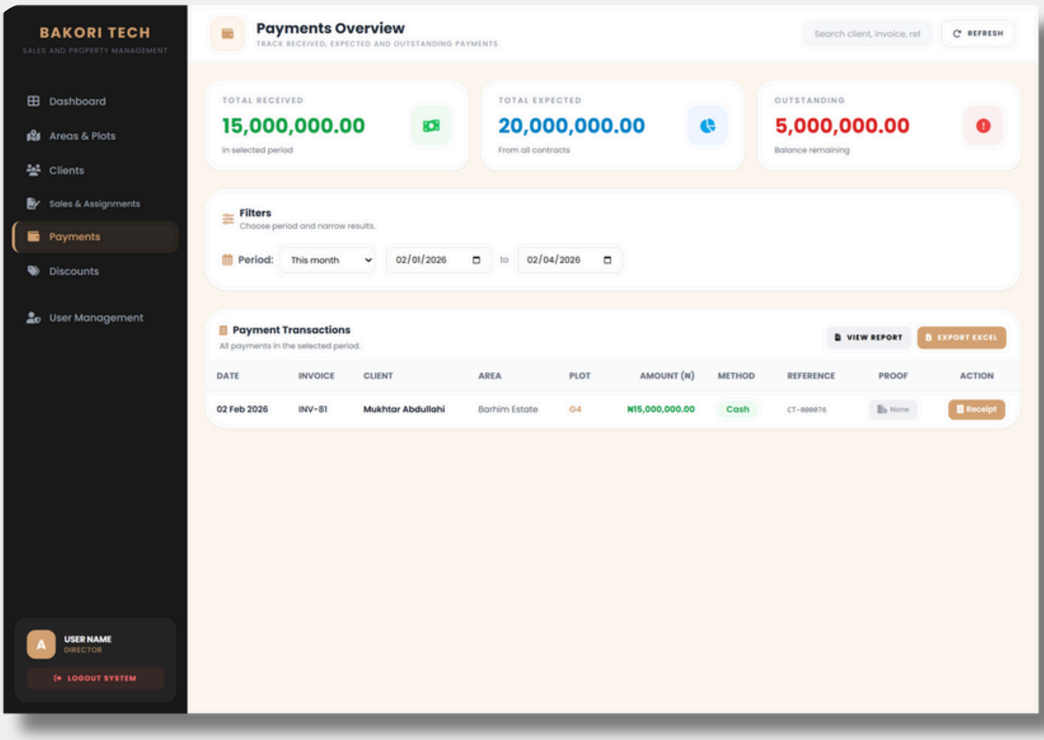
## Key Sales & Contract Features:

- **Period Filters:** View contract performance by month, week, year, or custom date range
- **Contract Summary:** Total contracts, total paid, total value, and outstanding (based on selected period filters)
- **Contract Records:** Searchable table showing client, area, plot, plan type, and status
- **Installment Plans:** Supports monthly payment plans with contract duration tracking
- **Status Tracking:** Contracts can be monitored as Active or Completed
- **Outstanding Monitoring:** Quickly identify pending balances for follow-up

# Payments & Receipts



**Record payments, track expected vs received amounts, and generate receipts with exportable transaction reports.**



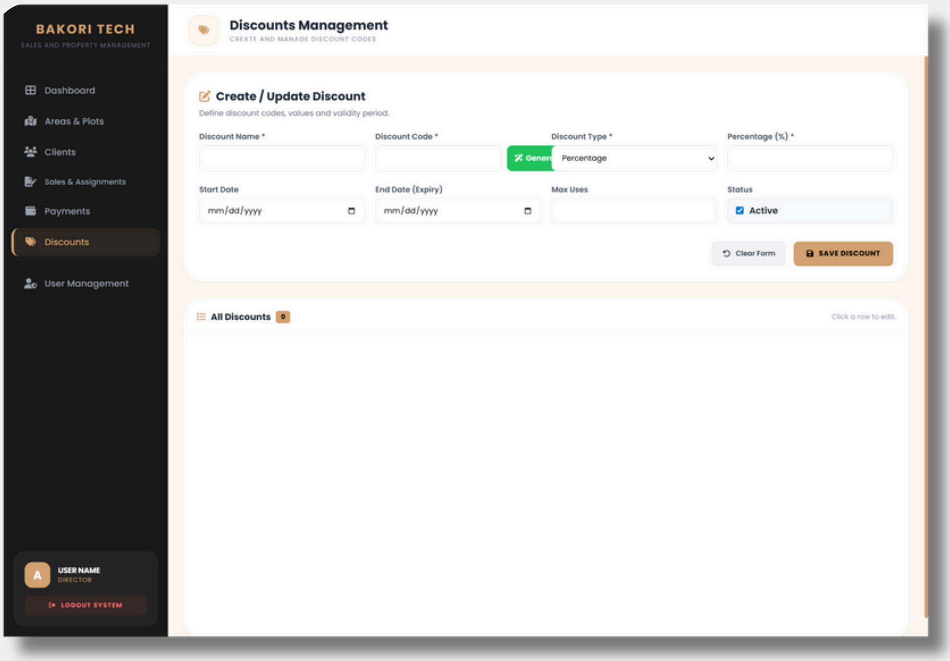

Designed for accuracy: clear transaction history, proof tracking, and professional receipts for every payment.

## Key Payment Features:

- **Period Filters:** Log payments with amount, method, reference, and proof (if applicable)
- **Period Filters:** Track payments by month, week, year, or custom date range
- **Financial Summary:** Total received, total expected, and outstanding (based on selected period)
- **Transaction History:** Detailed table for all payment activity with searchable records
- **Receipts:** View and generate company receipts per transaction
- **Report Exports:** Download payment reports in PDF or Excel format for accounting and review

# Discounts & Promos

**Create and manage discount campaigns with codes, validity periods, and flexible pricing rules.**




Built for flexibility: controlled discounts that support marketing campaigns without breaking record accuracy.

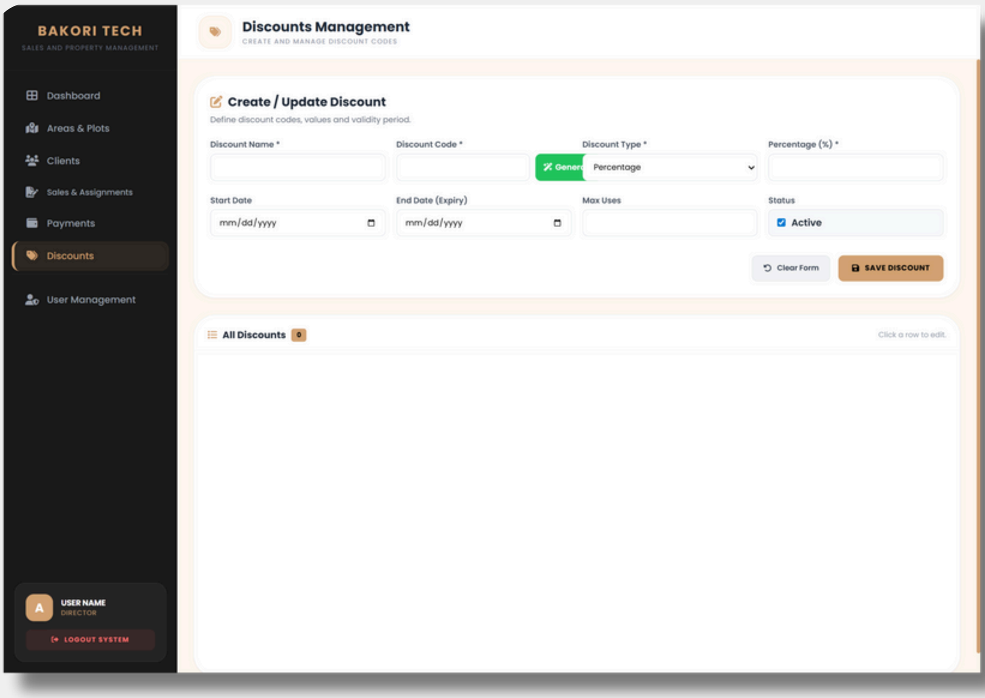
## Key Discount Features

- **Discount Creation:** Add discounts with name and unique discount code
- **Discount Types:** Supports percentage and fixed amount discounts
- **Validity Periods:** Set start date and end date for each campaign
- **Usage Control:** enable/disable discounts with status management
- **Clean Application:** Discounts reflect properly on contract totals and outstanding balances
- **Tracking & Management:** View and manage active and expired promotions in one place

# User Management & Roles



**Create and manage staff accounts with controlled access, security actions, and role-based permissions.**




Designed for control and security: manage access confidently as your team grows.

## Key User Management Features

- User Creation: Add new staff accounts with assigned roles and access level
- Role-Based Access: Control what each user can view or manage inside the system
- Account Status Control: Activate or deactivate users when staff changes occur
- Password Reset Support: Reset user access quickly to maintain productivity
- Secure Operations: Protect sensitive client, sales, and payment records from unauthorized access
- Team Scalability: Built to support multi-user operations across departments

# Reporting & Automations

**Exportable reports and automated notifications that keep management informed and operations consistent.**


### Exportable Reports

PDF & Excel Downloads

Generate clean reports for payments, contracts, and performance tracking. Reports can be exported as PDF or Excel for accounting, auditing, and management review.

### Management Notifications

CEO/Director Alerts

Automatic notifications are sent to management whenever a new client is created or a payment is recorded. This improves visibility, accountability, and faster decision-making.

### Client Communication

Welcome & Payment Updates

Clients receive a welcome email when added to the system and can track their payment progress over time. This improves trust, reduces follow-ups, and supports a better customer experience.

Note: Customizable Solution

This system is fully customizable. Features, workflows, branding, reports, user roles, and notifications can be tailored to match your business process and operational requirements.

# Ready to Get Started?

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